RUM Group Inc.

RUM

Nasdaq; business equipment; SIC 7370, Services-Computer Programming, Data Processing, Etc.; CIK 0001830081

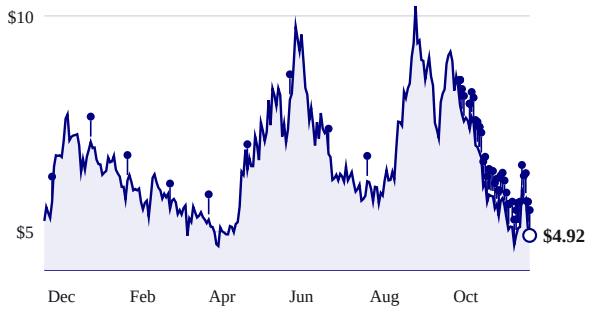
None

No letter

6 of 13 inputs computable; 7 are required, with a score in every sleeve

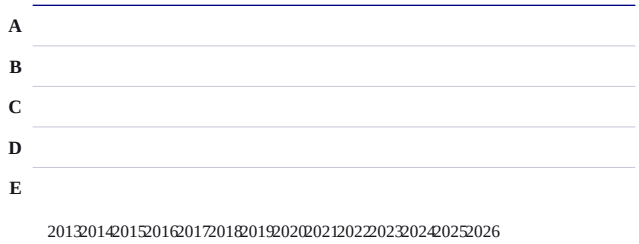
Scoreboard	
Reliability	0.87 AUC filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025
Peer failure rate	1.03% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$120M to $591M assets total assets $336.8M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	thin data not computable: dilution, distress, fortress balance sheet
Inputs computable	6 of 13
Graded from	filings received through Mar 5, 2026 258 days before the rescan; latest periodic filing 10-Q received Nov 12, 2026
Last close	$4.91 2026-11-17; market equity $0; no price enters the letter

Share price, twelve months to the rescan



Split-adjusted close. Each lollipop is a rescan and carries the letter held then.

Letter at every rescan, 2012 to 2026



Sector percentile at each rescan, stronger toward the top; facts filed by each date only.

Business, in the company's words

opening of Item 1 of the 10-K received Mar 5, 2026

specifies otherwise, references to the "Company," "we," "us" or "our" are to, (a) prior to the consummation of the business combination (the "CF Business Combination") contemplated by that certain business combination agreement, dated December 1, 2021 (as amended, the "CF Business Combination Agreement"), by and between CF Acquisition Corp. VI, a Delaware corporation ("CF VI"), and Rumble Inc., a corporation formed under the laws of the Province of Ontario, Canada ("Legacy Rumble"), either (i) CF VI or (ii) Legacy Rumble, as the context may require, and (b) following the closing of the CF Business Combination, Rumble Inc., a Delaware corporation.

The thirteen inputs

lower percentile is stronger; sleeves and inputs within a sleeve carry equal weight

Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 82.9						
Gross profitability	(2.0%)	29.2%		98.2	511	2025-12-31
Return on invested capital	not computable	11.2%				

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one or more required annual facts are missing					
Accruals ratio	(4.3%)	(7.4%)	67.6	565	2025-12-31
Gross margin stability, five years	not computable	2.3 pts			
five annual gross margins are required; found 2					
Solvency, sleeve percentile 34.0					
Altman Z double-prime	0.93	2.21	54.5	515	2025-12-31
Net debt to EBITDA	not computable	1.11x			
one or more required annual facts are missing					
Interest coverage	not computable	4.90x			
one or more required annual facts are missing					
Current ratio	5.84x	1.98x	13.5	599	2025-12-31
Growth and financing, sleeve percentile 37.8					
Revenue growth, three-year compound	36.7%	6.5%	6.6	501	2025-12-31
Free cash flow growth, three-year compound	not computable	17.5%			
four consecutive annual FCF observations are required; found 3					
Reinvestment rate	not computable	15.1%			
pretax income must exceed the validity floor and imply a 0%-100% tax rate					
Asset growth, three years	(2.8%)	5.0%	69.1	518	2025-12-31
Net share issuance, one year	not computable	0.5%			
firm-wide XBRL shares cannot be assigned to one ticker class					

Warnings

1 of 7 checks triggered; none of them enters the letter

Check	Measured
Thin data	6 of 13 grade factors are computable; minimum is 7

What the price implies

at the 2026-11-17 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	10.2%	(2.2%)	59
Distance from 52-week high	(52.0%)	(37.6%)	32
EBIT to enterprise value	not computable	1.8%	
Free cash flow yield	not computable	3.0%	
Book value to price	not computable	0.27	
Sales to price	not computable	0.32	
Composite equity issuance, five years	not computable	4.3%	
Relative strength against the sector, log excess return	(0.17)	(0.29)	59
Twelve-month failure probability, CHS model	not computable	0.05%	

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score None of 9, period end 2025-12-31	
Return on assets above zero	fail
Operating cash flow above zero	fail
Return on assets improved	pass
Operating cash flow exceeds net income	pass
Long-term leverage fell	fail
Current ratio improved	pass
No new shares issued	fail
Gross margin improved	pass
Asset turnover improved	pass

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Cash, filings, liquidity	
Cash and equivalents	$134.4M
Operating cash flow, four quarters	-$143.3M
Months of runway	11.3
Days since last periodic filing	6 (10-Q received Nov 12, 2026)
Median daily dollar volume, 63 sessions	$26.8M

Sources

every fact behind the inputs; each row links to its filing index on sec.gov

#	Concept	XBRL tag	Value	Period end	Received	Form	Accession
1	revenue	us-gaap:Revenues	$100.6M	2025-12-31	2026-03-05	10-K	26-024099
2	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$107.4M	2025-12-31	2026-03-05	10-K	26-024099
3	assets	us-gaap:Assets	$336.8M	2025-12-31	2026-03-05	10-K	26-024099
4	net income	us-gaap:NetIncomeLoss	-$81.8M	2025-12-31	2026-03-05	10-K	26-024099
5	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$70.4M	2025-12-31	2026-03-05	10-K	26-024099
6	assets	us-gaap:Assets	$195.3M	2024-12-31	2026-03-05	10-K	26-024099
7	current assets	us-gaap:AssetsCurrent	$264.5M	2025-12-31	2026-03-05	10-K	26-024099
8	current liabilities	us-gaap:LiabilitiesCurrent	$45.3M	2025-12-31	2026-03-05	10-K	26-024099
9	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$565.4M	2025-12-31	2026-03-05	10-K	26-024099
10	operating income	us-gaap:OperatingIncomeLoss	-$126.7M	2025-12-31	2026-03-05	10-K	26-024099
11	book equity	us-gaap:StockholdersEquity	$274.8M	2025-12-31	2026-03-05	10-K	26-024099
12	liabilities	us-gaap:Liabilities	$62.0M	2025-12-31	2026-03-05	10-K	26-024099
13	revenue	us-gaap:Revenues	$95.5M	2024-12-31	2026-03-05	10-K	26-024099
14	revenue	us-gaap:Revenues	$81.0M	2023-12-31	2025-03-25	10-K	25-001863
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$39.4M	2022-12-31	2023-03-30	10-K	23-024638
16	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$4.1M	2025-12-31	2026-03-05	10-K	26-024099
17	depreciation amortization	us-gaap:Depreciation	$5.8M	2025-12-31	2026-03-05	10-K	26-024099
18	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$81.8M	2025-12-31	2026-03-05	10-K	26-024099
19	income tax	us-gaap:IncomeTaxExpenseBenefit	$67,228	2025-12-31	2026-03-05	10-K	26-024099
20	current assets	us-gaap:AssetsCurrent	$136.1M	2024-12-31	2026-03-05	10-K	26-024099
21	current liabilities	us-gaap:LiabilitiesCurrent	$216.7M	2024-12-31	2026-03-05	10-K	26-024099
22	assets	us-gaap:Assets	$295.7M	2023-12-31	2025-03-25	10-K	25-001863
23	assets	us-gaap:Assets	$367.0M	2022-12-31	2024-03-27	10-K	24-026599

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